

Turn a search into a briefing

Create a dated roundup of publications on a topic, with source links and available document summaries. Use it to prepare for a meeting or review recent activity.

You will need: a signed-in account with trial or paid access for search briefings and exports.

01 Build the search first

Open **Search**, enter **age assurance** and refine the results with **Scope** and **Topics**. Check that the search covers the subject and jurisdictions you want in the briefing.

02 Choose the documents

To focus on particular records, tick their checkboxes before selecting **Summarise**. The button shows the selected count. To brief the search more broadly, use **Summarise** without selecting individual records.

03 Set the period and detail

Choose **Last day**, **7 days** or **30 days**; 7 days is the default. **Assembled** gives a structured roundup. **With summaries** adds available document summaries. Search date filters take precedence over this period.

04 Review, then share

Check the scope, period and linked records. **Share** copies a link; recipients sign in with a free account. For a PDF, choose **Export → Summary - PDF**, then save as PDF or print from the browser's print view.

FROM RESULTS TO A SHAREABLE BRIEFING

 Share Export ▾ Pin Save search Set up alerts Summarise

Start with **Summarise**. Use the **Export** menu and its summary PDF option to open a layout you can print or save as PDF.

YOUR FIRST RESULT

A briefing tied to a topic and reporting period, with links back to the publications behind it. Review the sources before sharing your own conclusions.

Try it: a 30-day topic roundup

Use this recipe to see what Vellum holds for your topic over the selected period. The number of matching records depends on the search and available coverage.

WORKED EXAMPLE

Search	age assurance
Scope	Jurisdiction: United Kingdom
Search date filters	Clear them if you want the briefing's period to control.
Documents	Use the search, or tick a smaller set of relevant records.
Briefing settings	30 days + With summaries
Useful output	A source-linked roundup saved as PDF or shared by link.

Choose the right kind of summary

Assembled organises publication metadata such as dates, publishers, titles and counts. **With summaries** adds available prepared summaries of individual documents. Use **Ask**, when available, to explore a specific question.

Check the reporting window

An explicit **Date** filter on the search overrides the briefing's period choice. Clear that filter to use the chosen rolling period, or retain it deliberately when preparing a roundup for fixed dates.

Understand gaps

A document without a prepared summary is marked accordingly. If no records match the period, the briefing says so. That describes the matching material in Vellum; it does not establish that nothing happened elsewhere.

Make it a regular habit

For recurring updates, set up an alert on the same search and choose **links + summary**. Choose daily or weekly delivery. Manage the email alert under **My Space → Alerts & reminders**.

BEFORE YOU SHARE

Check the topic, jurisdiction, reporting period and selected documents. Open the key sources, then give recipients the briefing link or the PDF you saved from the print view.

Next: Let Vellum come to you · Find the evidence you need

Companion to Vellum's Help & Resources. Controls and availability may vary by plan.